



# Department of Commerce

Innovation is in our nature.

## U.S. DEPARTMENT OF ENERGY

### WASHINGTON STATE AMERICAN RECOVERY AND REINVESTMENT ACT (ARRA) LOW-INCOME WEATHERIZATION ASSISTANCE PLAN

**2009**

Prepared by  
Washington State Department of Commerce

Rogers Weed, Director  
Will Graham, Assistant Director for Housing



Washington State  
Department of Commerce  
128 10th Avenue SW  
Post Office Box 42525  
Olympia, Washington 98504-2525

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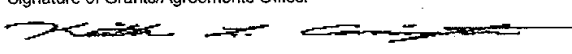
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<b>(Chapter 9 of the 2007 Policies and Procedures for Managing the Low-Income Weatherization Program)</b>	

## II. Annual File

### 1. Grant Application – Standard Form 424

ASSISTANCE AGREEMENT			
1. Award No. DE-EE0000086		2. Modification No.	
3. Effective Date 04/01/2009		4. CFDA No. 81.042	
5. Awarded To  COMMUNITY, TRADE AND ECONOMIC DEVELOPMENT, Attn: JOHN TOOHEY P. O. BOX 48350 OLYMPIA WA 985048350		6. Sponsoring Office  NETL - Morgantown U.S. Department of Energy NETL 3610 Collins Ferry Road P.O. Box 880 Morgantown WV 26507-0880	
7. Period of Performance  04/01/2009 through 03/31/2012			
8. Type of Agreement <input checked="" type="checkbox"/> Grant <input type="checkbox"/> Cooperative Agreement <input type="checkbox"/> Other		9. Authority 31 USC 6304 - see page 2 10 USC 2358	
10. Purchase Request or Funding Document No. 09EE000405			
11. Remittance Address  COMMUNITY, TRADE AND ECONOMIC DEVELOPMENT, Attn: JOHN TOOHEY P. O. BOX 48350 OLYMPIA WA 985048350		12. Total Amount Govt. Share: \$59,545,074.00 Cost Share : \$0.00 Total : \$59,545,074.00	
13. Funds Obligated This action: \$5,954,507.00 Total : \$5,954,507.00			
14. Principal Investigator Ms. Julie Palakovich 360-725-2948		15. Program Manager Carole S. Gates Phone: 303-275-4848	
16. Administrator NETL - Morgantown U.S. Department of Energy NETL 3610 Collins Ferry Road P.O. Box 880 Morgantown WV 26507-0880			
17. Submit Payment Requests To Payment - Direct Payment from U.S. Dept of Treasury		18. Paying Office	
19. Submit Reports To			
20. Accounting and Appropriation Data Recovery Act - WAP Formula Grants			
21. Research Title and/or Description of Project WEATHERIZATION ASSISTANCE PROGRAM FOR LOW INCOME PERSONS UNDER THE RECOVERY ACT			
For the Recipient		For the United States of America	
22. Signature of Person Authorized to Sign		25. Signature of Grants/Agreements Officer 	
23. Name and Title		24. Date Signed	
26. Name of Officer Keith L. Carrington		27. Date Signed 03/31/2009	

## 2. Budget

DOE Weatherization Formula Grants – American Recovery and  
Reinvestment Act (ARRA) Budget  
April 1, 2009 to March 31, 2012

(Form DOE F 4600.4)

### ----Grant Program Function or Activity----

Expenditure Categories	(1) Grantee Admin	(2) Subgrantee Admin	(3) Grantee T&TA	[4] Subgrantee T&TA	(5) Program Operations	SUBTOTAL
a. Personnel	806,506		1,482,682			2,289,388
b. Fringe Benefits	201,677		370,670			572,347
c. Travel	70,800		156,300			227,100
d. Equipment			21,000			21,000
e. Supplies	27,111		43,595			70,706
f. Contractual	108,000	4,168,155	6,251,000	1,100,000	31,855,000	54,769,822
g. Construction	0		0			0
h. Other	95,900		147,500			243,400
i. Total Direct Charges	1,310,194	4,168,155	8,472,747	1,100,000	31,855,000	58,193,763
j. Indirect Charges	476,158		875,153			1,351,311
k. TOTALS	<b>\$1,786,352</b>	<b>\$4,168,155</b>	<b>\$9,347,900</b>	<b>\$1,100,000</b>	<b>\$31,855,000</b>	<b>\$48,257,407</b>

### ----Grant Program Function or Activity----

Expenditure Categories	(6) Liability Insurance	(7) Leveraging	(8) Health & Safety	(9) Financial Audit	TOTAL
a. Personnel					
b. Fringe Benefits					
c. Travel					
d. Equipment					
e. Supplies					
f. Contractual	150,000	300,000	10,785,667	52,000	
g. Construction					
h. Other					
i. Total Direct Charges	150,000	300,000	10,785,667	52,000	
j. Indirect Charges					
k. TOTALS	<b>\$150,000</b>	<b>\$300,000</b>	<b>\$10,785,667</b>	<b>\$52,000</b>	<b>\$59,545,074</b>

### 3. Subgrantees

#### 3.a. Weatherization Service Providers

##### Washington State Local Agency Weatherization Coordinators, Service Area, and Congressional Districts

**Benton-Franklin Community Action Committee**

Dave Odom, Weatherization Program Director  
720 West Court Street  
Pasco, Washington 99301-4178  
509/545-4042 ext 215 - FAX 509/545-1449  
E-mail: dodom@bfcac.org  
(Benton and Franklin Counties) **CD 4**

**Blue Mountain Action Council**

Ted Koehler, Housing Program Director  
342 Catherine Street  
Walla Walla, Washington 99362-3057  
509/529-4980 ext 135 - FAX 509/529-4985  
E-mail: tedk@bmacww.org  
(Columbia, Garfield, & Walla Walla Counties) **CD 5**

**Chelan-Douglas Community Action Council**

Dani Zane, Wx & Home Rehab Director  
620 Lewis Street  
Wenatchee, Washington 98801-3435  
509/665-6473 - FAX 509/888-7254  
E-mail: daniz@cdcac.org  
(Chelan and Douglas Counties) **CD 4**

**City of Seattle****Office of Housing – HomeWise Program**

John Flynn, HomeWise Program Manager  
PO Box 94725  
Seattle, Washington 98124-4725  
206/684-0354 - FAX 360/397-7119  
E-mail: john.flynn@seattle.gov  
(City of Seattle only) **CD 1 & 7**  
Physical Address: 700 Fifth Avenue, Suite 5700

**Clark County Department of Community Services**

Tif Rock, Program Manager Housing Preservation  
PO Box 5000  
Vancouver, Washington 98666-5000  
360/397-2075 ext 7809 - FAX 360/397-6033  
E-mail: tif.rock@co.clark.wa.us  
(Clark County) **CD 3**  
Physical Address:  
1601 East Fourth Plain Blvd., Bldg.17, Suite C214, 98661

**Coastal Community Action Program**

Debbie Sutherby, Weatherization Coordinator  
117 East Third  
Aberdeen, Washington 98520-0304  
360/533-5100 ext 112 - FAX 360/532-4623  
E-mail: debbies@coastalcap.org  
(Grays Harbor and Pacific Counties) **CD 3 & 6**

**Community Action Center of Whitman County**

Dale Miller, Housing Coordinator  
350 SE Fairmont Road  
Pullman, Washington 99163-5500  
509/334-9147 - FAX 509/334-9105  
E-mail: dalem@cacwhitman.com  
(Whitman County) **CD 5**

**Community Action Council****of Lewis, Mason, and Thurston Counties**

Dale Lewis, Dir of Housing & Emergency Svcs  
420 Golf Club Road #100  
Lacey, Washington 98503  
360/438-1100 ext 1120 - FAX 360/491-7729  
E-mail: dalel@cacmt.org  
(Lewis, Mason, and Thurston Counties) **CD 3, 6 & 9**

**Community Action Partnership**

Larry Stamper, Weatherization Director  
124 New 6th Street  
Lewiston, Idaho 83501  
208/746-3351 ext 230 - FAX 208/746-5456  
E-mail: l.stamper@acommunityactionpartnersip.org  
(Asotin County) **CD 5**

**HopeSource**

Geoff Crump, Chief Operations Officer  
PO Box 680  
Ellensburg, Washington 98926-3064  
509/925-1448 - FAX 509/925-1204  
E-mail: gcrump@hopesource.us  
(Kittitas County) **CD 4**  
Physical Address: 601 West 5th Avenue

**Housing Authority of Skagit County**

John Day, Weatherization Coordinator  
539 North Hill Blvd  
Burlington, Washington 98233  
360/757-6509 - FAX 360/757-7913  
E-mail: jday@skagitcountyha.org  
(Skagit County) **CD 2**

**King County Housing Authority**

Nikki Parrott, Director Housing Rep & Wx  
5200 Southcenter Blvd., Suite 280  
Tukwila, Washington 98188-3326  
206/214-1250 - FAX 206/357-2446  
E-mail: nikkip@kcha.org  
(All of King County except City of Seattle) **CD 1, 7, 8 & 9**

**Kitsap Community Resources**

Darlene Norris-Cook, Dir of Hsg/Community Svcs  
1201 Park Avenue  
Bremerton, Washington 98337-1760  
360/473-2027 - FAX 360/792-8708  
E-mail: darlenec@kcr.org  
(Kitsap County) **CD 6**

**Lower Columbia Community Action Council**

Sheila Girt, Energy & Housing Services Director  
1526 Commerce Avenue  
Longview, Washington 98632-0173  
360/425-3430 ext 220 - FAX 360/425-6657  
E-mail: sheilag@lccac.org  
(Cowlitz and Wahkiakum Counties) **CD 3**

**Metropolitan Development Council**

Samphas Phok, Prog Dir Wx/Energy Asst/Maintenance  
721 Fawcett Avenue South, Suite # 201  
Tacoma, Washington 98402-5503  
253/284-7813 - FAX 253/597-6700  
E-mail: phok@mdc-tacoma.org  
(City of Tacoma only) **CD 6**

**North Columbia Community Action Council**

Kenneth C. Sterner, Executive Director  
903 Third Ave  
Moses Lake, Washington 98837-0114  
509/765-9206 ext 246 - FAX 509/765-9619  
E-mail: ksterner@nccac.net  
(Adams, Grant, and Lincoln Counties) **CD 4 & 5**

**Okanogan County Community Action Council**

Ron Whiteside, Housing Program Manager  
PO Box 1067  
Okanogan, Washington 98840-1067  
509/422-4041 - FAX 509/826-7339  
E-mail: ronw@occac.com  
(Okanogan County) **CD 4**  
Physical Address: 424 South Second Avenue

**Olympic Community Action Programs**

Hank Gibson, Director of Housing  
502 West 8th Street  
Port Angeles, Washington 98363  
360/452-9440 ext 6602 - FAX 360/452-3987  
E-mail: hgibson@olycap.org  
(Clallam and Jefferson Counties) **CD 6**

**Opportunities Industrialization Center**

of Washington  
Chris Link, Housing Director  
815 Fruitvale Boulevard  
Yakima, Washington 98902-1467  
509/452-2235 - FAX 509/452-2826  
E-mail: arthurlink@aol.com  
(All of Yakima County North of Union Gap) **CD 4**  
Physical Address for Chris Link: 1419 Hathaway

**Pierce County Community Action Programs**

Sherry Martin, Program Coordinator  
3602 Pacific Avenue, Suite 200  
Tacoma, Washington 98418-7920  
253/798-3835 - FAX 253/798-2817  
E-mail: smart1@co.pierce.wa.us  
(All of Pierce County except City of Tacoma) **CD 6, 8 & 9**

**Rural Resources Community Action**

John Hill, Housing Program Director  
956 South Main, Suite A  
Colville, Washington 99114  
509/684-8421 ext 6055 - FAX 509/684-4740  
E-mail: jhill@ruralresources.org  
(Ferry, Pend Oreille, and Stevens Counties) **CD 5**

**Snohomish County Human Services Dept.**

Bill Beuscher, Program Manager  
3000 Rockefeller Avenue - MS 305  
Everett, Washington 98201-3511  
425/388-7202 - FAX 425/388-7311  
E-mail: bill.beuscher@co.snohomish.wa.us  
(Snohomish County) **CD 2**

**Spokane Neighborhood Action Partners**

Chris Davis, Housing Improvements Director  
212 West Second Avenue  
Spokane, Washington 99201-3606  
509/744-3370 ext 208 - FAX 509/744-3374  
E-mail: cdavis@snapwa.org  
(Spokane County) **CD 5**

**The Opportunity Council**

Kyle White, Housing Programs Manager  
1322 North State Street  
Bellingham, Washington 98225  
360/733-6559 ext 111 - FAX 360/671-2753  
E-mail: kyle.white@opportunitycouncil.org  
(Island, San Juan, and Whatcom Counties) **CD 2**

**Washington Gorge Action Programs**

Ken Bergin, Program Coordinator  
1250 East Steuben  
Bingen, Washington 98605  
509/493-2662 ext 203 - FAX 509/493-4430  
E-mail: ken@wgap.ws  
(Klickitat and Skamania Counties) **CD 3 & 4**

**Yakima Valley Farm Workers Clinic**

(Northwest Community Action Center)  
Marcy McDonald, Wx Prog & Financial Coordinator  
PO Box 831  
Toppenish, Washington 98948-0831  
509/865-7630 ext 206 - FAX 509/865-5116  
E-mail: marcym@ncactopp.org  
(All of Yakima County South of Union Gap) **CD 4**  
Physical Address: 706 Rentschler Lane

### 3.b. Allocation by Subgrantee and 4. Production Schedule

Agency	Est. Units	Admin	Program	T&TA	Total Budget
401 - Benton-Franklin Community Action Committee	214	\$128,576	\$1,262,966	\$31,554	\$1,423,095
402 - Blue Mountain Action Council	78	\$46,593	\$457,670	\$36,744	\$541,007
403 - Chelan-Douglas Community Action Council	162	\$97,271	\$955,469	\$29,922	\$1,082,662
404 - City of Seattle Office of Housing	734	\$441,047	\$4,332,284	\$56,038	\$4,829,369
405 - Olympic Community Action Programs	149	\$89,397	\$878,127	\$30,926	\$998,450
406 - Clark County Dept of Community Services	295	\$177,447	\$1,743,010	\$28,836	\$1,949,292
407 - Coastal Community Action Program	154	\$92,202	\$905,677	\$22,556	\$1,020,435
408 - Community Action Partnership	34	\$20,158	\$188,104	\$18,036	\$236,198
409 - CAC of Whitman County	124	\$74,575	\$732,530	\$31,261	\$838,366
410 -CAC of Lewis, Mason and Thurston Counties	387	\$232,342	\$2,282,234	\$33,521	\$2,548,097
411 - North Columbia Community Action Council	174	\$104,697	\$1,028,410	\$27,997	\$1,161,104
412 - Housing Authority of Skagit County	118	\$70,785	\$695,301	\$36,367	\$802,452
413 - King County Housing Authority	779	\$467,925	\$4,596,300	\$56,038	\$5,120,263
414 - Kitsap Community Resources	201	\$120,934	\$1,187,904	\$33,186	\$1,342,024
415 - HopeSource	109	\$65,633	\$644,697	\$22,472	\$732,802
416 - Washington Gorge Action Programs	53	\$31,812	\$296,860	\$29,880	\$374,176
417 - Lower Columbia Community Action Council	131	\$78,510	\$771,178	\$18,705	\$868,393
418 - Metropolitan Development Council	334	\$200,725	\$1,971,669	\$32,391	\$2,204,786
419 - Rural Resources Community Action	140	\$84,249	\$827,558	\$33,354	\$945,161
420 - Okanogan County Community Action Council	110	\$66,290	\$651,146	\$42,645	\$760,081
421 - Pierce County Community Action Programs	479	\$287,928	\$2,828,238	\$32,308	\$3,148,473
422 - Snohomish County HSD	436	\$261,621	\$2,569,832	\$45,784	\$2,877,237
423 - Spokane Neighborhood Action Partners	765	\$459,581	\$4,514,340	\$112,121	\$5,086,042
424 - The Opportunity Council	353	\$212,024	\$2,082,651	\$50,597	\$2,345,272
425 - Yakima Valley Farm Workers Clinic	213	\$127,917	\$1,256,494	\$56,038	\$1,440,449
426 - OIC of Washington	213	\$127,917	\$1,256,494	\$50,723	\$1,435,134
TRIBAL WEATHERIZATION ALLOCATION	231	\$133,000	\$1,767,000	\$100,000	\$2,000,000
<b>TOTALS</b>	<b>7,170</b>	<b>\$4,301,155</b>	<b>\$42,684,142</b>	<b>\$1,100,000</b>	<b>\$48,110,822</b>
	Est. Units	Admin	Program	T&TA	TOTAL

#### NOTES:

Estimated Units - Program Operations (not including 25% Health and Safety) divided by the 2009 DOE Average Adjusted Expenditure Limit of \$6500.

Administration includes the optional additional 5% for agencies under \$350,000.

## 5. Energy Savings

DOE Program	Amount	Line
Total DOE State Weatherization Allocation	\$59,545,074	(a)
Total Cost associated with Administration, T&TA, Financial and Energy Audits or 15% of allocation	\$8,931,761	(b)
Subtract the amount entered in line (b) from line (a), for a total Federal (DOE) funds available to weatherize homes	\$50,613,313	(c)
State Average Cost per Home or National WAP Program Year Average Cost per Home (i.e. PY2009 \$6,500)	\$6,500	(d)
Divide the amount entered on line (c) by the amount entered on line (d), for Total Estimated Homes to be Weatherized	\$7,787	(e)
Multiply (e) by 30.5 MBTU* for Total Annual Estimated Energy Savings resulting from DOE appropriated funds	\$237,493	(f)
<b>All Funding Sources</b>		
Total funds (e.g., DOE WAP, State, Leveraged, LIHEAP, and other non-Federal sources of funds) used by the State to weatherize homes	\$82,715,021	(g)
Total cost associated with the administration of Weatherization funds or 15% of total funds available to weatherize homes	\$12,407,253	(h)
Subtract the amount entered in line (h) from line (g), for total funds available to weatherize homes	\$70,307,768	(i)
State Average Cost per Home or National WAP Program Year Average Cost per Home (i.e., PY2009 \$6,500)	\$6,500	(j)
Divide the amount entered on line (i) by the amount entered on line (j), for Total Estimated Homes to be Weatherized	\$23,014	(k)
Multiply (k) by 30.5 MBTU* for Total Annual Estimated Energy Savings resulting from all funding sources	\$701,927	(j)

\* The most recent Metaevaluation of the National Weatherization Assistance Program (ORNL/CON-488) estimates the annual savings of 30.5 Mbtu per year for natural gas heated homes. The study incorporates state-level evaluations for the period 1993-2002. While slightly lower than the estimated savings from the first Metaevaluation, which was 31.2 Mbtu, the degree of confidence associated with the current estimate is higher because the greater number of studies included in the analysis. The current Metaevaluation result is considered a reasonable and conservative proxy for average energy savings from households of all fuel types.



## **6. Training, Technical Assistance, and Monitoring Activities**

### **ALLOCATION OF FUNDING**

For DOE ARRA Weatherization, Washington State's allocation for Training and Technical Assistance (T&TA) activities is \$10,447,900. The 2009-11 Washington State biennial budget passed by the 2009 Legislature has determined that, subject to federal requirements, Department of Commerce (COMMERCE) will allocate DOE ARRA Training and Technical Assistance funding as follows:

Up to \$4,000,000 to the State Board for Community and Technical Colleges to provide workforce training related to weatherization and energy efficiency; up to \$3,000,000 to The Opportunity Council Building Performance Center in Bellingham to provide workforce training related to energy efficiency and weatherization; and up to \$3,500,000 to community-based organizations and to community action agencies.

Based on DOE ARRA Weatherization Program requirements for subgrantee monitoring, training, and technical assistance, COMMERCE will retain \$3,200,000 of T&TA funding to conduct these required activities over the three-year ARRA grant period. The remaining ARRA T&TA funding will be allocated as follows,

\$2,774,000 to the State Board for Community and Technical Colleges to provide workforce training related to weatherization and energy efficiency; \$2,117,000 to The Opportunity Council Building Performance Center in Bellingham to provide workforce training related to energy efficiency and weatherization; \$2,400,000 to community based organizations and to community action agencies.

Any use of funds allocated above must meet DOE's rules that state, "The local service providers should be the primary recipients of T&TA activities." All training and technical assistance will help to support the goals of sound fiscal management, improved program management, efficient cost-effective services, quality assurance, improved crew/contractor quality of work, energy efficiency, housing safety, and increased production of weatherized units.

### **TRAINING AND TECHNICAL ASSISTANCE ACTIVITIES**

Washington State's weatherization program incorporates energy and resource conservation; energy efficiency improvements; weatherization-related repairs, indoor air quality improvements, health and safety improvements; and client conservation education.

Washington's weatherization network of community action agencies will play an important role in one of the goals of Washington Evergreen Jobs Act, which is creating 15,000 new green economy jobs by 2020. 30 percent of these jobs must be targeted to veterans, National Guard members, and low-income and disadvantaged populations. By providing these jobs, local weatherization agencies will further the goals of this law by preparing the workforce to take full advantage of green economy job opportunities and by helping to make Washington a net exporter of green industry products and services. In distributing ARRA funding, COMMERCE must capitalize on existing partnership agreements and coordinate with other state agencies.

ARRA T&TA funding must be used and distributed in an effective and focused process that supports and benefits the weatherization program and the existing network of weatherization service providers in accordance with DOE rules. COMMERCE will work diligently to meet both Washington State legislative direction and DOE weatherization guidance, which stipulates that the local weatherization service providers should be the primary recipients of training and technical assistance activities. Until direction and guidance can be determined, COMMERCE will plan to pass through at least \$1,000,000 of T&TA funds to the existing weatherization service providers over the next three years.

Historically, contractors have been left out of most of the training planning efforts for weatherization. COMMERCE will consider including advocates from the private sector, both contractors and suppliers, when weatherization training planning efforts take place.

#### **A. The Building Performance Center**

Since 1999, the Building Performance Center (BPC) has been providing weatherization training to Washington's weatherization network. COMMERCE, BPC, and the Technical Development Committee identified the following core trainings for ARRA Weatherization:

- Blower Door/Pressure Diagnostics/House as a System
- Shell Measures/Air Sealing/Dense Pack
- Combustion Safety Testing
- Mobile Home Weatherization
- Indoor Air Quality/Ventilation
- Auditor Training/BPI Certification Preparation
- Multifamily TREAT Computerized Audit
- Heating Systems
- Mobile Home Weatherization Techniques and Best Practices

To meet training demands of an expanded weatherization work force, the BPC will increase the number of scheduled offerings. In addition, the BPC will provide consolidated four-day weatherization technology trainings or "boot camps" for new or existing subcontractors or crews of weatherization service providers. The techniques for lead safe weatherization are unique enough that required training focused on lead-based paint protocol specific to weatherization is warranted. COMMERCE is in compliance with Weatherization Program Notice (WPN) 09-6. The Housing Division of COMMERCE and its weatherization funding sources require all direct hire and contractor weatherization coordinators, crewmembers, workers, and supervisors to attend Lead Safe Weatherization training prior to doing any work on pre-1978 housing. Training is required within nine (9) months from the date of hire.

Training and technical assistance funds may also be used to train contractors participating in the low income weatherization program at the local agency level. Local agencies are advised to secure a retention agreement in exchange for the training that would stipulate that contractors will work in the Program, at a minimum, for a specific amount of time and should be in correlation to the cost of the T&TA provided.

There is a renewed focus on the assessment of mold growth and treatment of conditions in which mold proliferates. The BPC developed a 'Mold and Moisture' Train the Trainer curriculum using the Montana State University Protocols as directed by DOE. This training is mandatory for all agencies in our network, so that local agencies have the capacity to train their new staff on mold and moisture issues. Mold training is required for new staff within none (9) months from the date of hire. BPC will also offer the Mold and Moisture Training regularly for both new hires and as a refresher course. In addition to the existing core trainings, the Technical Development Committee has recommended these additional trainings:

- Window retrofit installation
- Asbestos work and inspection
- HRAI ventilation training and certification
- Multi-family auditing
- Davis Bacon/prevaling wage application
- In-depth training on heating systems, particularly heat pumps
- Renewable energy siting and installation
- Client conservation education
- Energy OutWest Field Guide
- IR thermal imaging
- Business practices for the weatherization coordinator/manager practice
- Supervisor training for crews
- Cultural awareness

The Peer Circuit Rider (PCR) Program, administered by the BPC, is an effective and a proactive resource geared to meet the specific training needs of local agencies, as identified by the local agencies or by COMMERCE staff. To most effectively demonstrate training principles and work within limited budgets of smaller agencies, the training is conducted at or near the location of the agency receiving the training. This ensures the broadest level of accessibility to necessary trainings. The BPC also organizes statewide training, particularly the core and advanced courses required for a skilled weatherization workforce.

PCR trainings are accessible to all individuals because the classes are offered in various locations across the state, not just at the BPC in Bellingham. The intent of the PCR is to take the training to the local agency or weatherization work site to provide hands-on training. The Request for Proposal for weatherization training was expanded to highlight public comment regarding accessibility to becoming a weatherization trainer. COMMERCE verified that concern regarding equal access to hiring and training was addressed throughout the content of the document.

The Building Performance Center's website is <http://bpc.opppco.org/index.html>, which provides course descriptions, on-line training registration and a schedule of planned trainings.

## **B. Building Performance Institute Certification**

The Building Performance Center (BPC) has become an affiliate of the Building Performance Institute (BPI) of White Plains, New York. The agency has had four staff members attain proctor certification for BPI Building Analyst and Building Technician.

Since 2005, when the BPC attained affiliate status and certified proctors, it has certified at least one weatherization program staff at each of our 26 agencies. The guiding principles of the Building Performance Institute are closely aligned with those of our low-income weatherization network. They are:

- Do no harm to occupants, workers, and houses
- Identify and resolve potential health and safety issues
- Recommend cost-effective home improvements
- Install measures effectively and safely
- Test in and test out
- Consider the worst-case scenario
- Apply "house as a system" principles to home improvement specifications
- Document your work

## **C. The Tiered Approach to Weatherization**

As part of the ARRA Weatherization Program ramp-up, COMMERCE is revising the way it provides services to low-income weatherization clients. As always, the focus of the program is to save energy. However, we also recognize the opportunity to create jobs, reduce carbon emissions, and stimulate the economy.

COMMERCE is partnering with the Washington Service Corps to place up to 50 volunteer members to assist local agencies with weatherization ramp-up efforts. Among the areas of support that Service Corps members will provide to local agencies include capacity building, outreach, coordination and scheduling, follow-up with families receiving weatherization services, data collection, and reporting.

In the spirit of volunteerism and the pending implementation of the Edward M. Kennedy Serve America Act Clean Energy Corps, COMMERCE is working with the Washington State Department of Ecology Conservation Corps to develop opportunities to collaborate in weatherizing low-income housing. A pilot project under development will explore utilizing Conservation Corps crews to perform Tier 1 weatherization measures Housing Trust Fund (HTF) portfolio multi-family projects. It is anticipated that a crew-based approach will expedite the number of units completed as well as quickly identify units and/or buildings needing additional weatherization measures (Tier 2 or 3).

Starting in program year 2009, weatherization services in Washington will be delivered in a three-tiered approach, building on the historical whole house weatherization method. Tiers are intended to increase local agency flexibility, expand career opportunities and provide weatherization services to more households faster.

TIER 1 - A completed Tier 1 project is a “Unit Served.” Weatherization services for Tier 1 are intended to be quick, focused, effective, and limited. Tier 1 can include pre-audit duties and some contracted services. Tier 1 services do not require Building Performance Institute (BPI) Building Analyst Certification. Tier 1 training will be delivered in seven individual modules:

- Client Intake
- Energy Bill Analysis
- Weatherization Screener: to include identifying immediate health and safety concerns and taking digital photos of the house.
- Client Conservation Education
- “Clean Clothes” Weatherization Installer: to include CO detectors, smoke alarms, CFLs, water heater pipe insulation, water flow restrictors, and showerheads.
- Baseload Technician: to gather equipment information on refrigerator, furnace or heating system, and window air conditioners for recommendations as to repair or replacement.
- Pre-Assessment: to include identification of any health and safety measures or weatherization-related repairs, complete the mold assessment and pollution source survey, infrared scan of sidewalls, and make referral for Tier 2, if applicable.

Tier 2 - A completed Tier 2 project is a “Unit Completed” and meets the definition of a “DOE weatherized unit.” Weatherization services for Tier 2 are all cost-effective whole house weatherization services altering the building envelope and thermal and pressure boundaries, the house-as-a-system approach. Tier 2 services require additional training, experience, and Building Performance Institute (BPI) Building Analyst Certification.

Tier 3 - A completed Tier 3 project is a “Renewable.” A renewable energy project provides cost-effective weatherization services considering long-term investment and modern renewable technologies such as photovoltaic’s, solar hot water, or solar heating systems. This tier expands Washington’s weatherization program services and will initially be on a case-by-case basis or pilot programs. Tier 3 requires alternative energy training, including the latest green technologies on specialized projects. Tier 3 training will focus not only on installation, but also on project selection to maximize the benefit. Designing the program in this way will help introduce new workforce to weatherization and provide upward mobility into highly skilled and rewarding jobs in our green industry.

Other opportunities for volunteer participation that will help the state achieve ARRA production goals will be explored.

#### **D. Incorporating Renewable Energy into Weatherization Projects**

To encourage the use of renewable resources in our projects, as identified in Tier 3, we plan to continue investigating the concept of a collaborative photovoltaic (PV) project partnering with funding sources, solar technology experts, trainers, and our low-income weatherization program network. Department of Energy’s acknowledgement of renewable energy systems in the Energy Policy Act of 2005 and Weatherization Program Notice 07-1 will help encourage availability, installation, and use. Depending on available funds, interest, and cost-effectiveness, solar technologies (hot water, PV arrays could be installed throughout the state. COMMERCE will also investigate other partnership opportunities for renewable energy applications for low-income housing.

## **E. Building Performance Training Center Expansion**

The Building Performance Center (BPC) has reached an agreement with the Bellingham Technical College to expand training facilities. BPC will provide detailed description and budgeting information for the development of a formal Weatherization Training Center to be located in Bellingham, WA. The proposed site has existing classrooms, accessible bathroom facilities, parking and warehouse space. The proposed renovation of the warehouse space will provide mock-ups and building component modules for hands-on demonstration and learning activities related to weatherization and energy efficiency retrofit work.

In addition, the BPC proposes utilizing the training center to conduct both the written and field exam for Building Performance Center Institute certifications for the Building Analyst, Envelope Professional and Heating Technician.

## **F. Development of Additional Training Centers in Washington State**

COMMERCE will issue a Request for Proposal for developing additional training centers in Washington to support ARRA production goals and look toward sustained program development and funding. The ideal training centers would not only develop new curricula and new training programs, but expand existing high school, community and technical college, journey-level skills improvement and apprenticeship training programs, and community-based training programs providing energy audit and energy efficiency services training. We would expect these training centers to implement internship, pre-apprenticeship and apprenticeship programs, and to have a rigorous recruitment process. The training centers must also be able to prove that they are able to provide the training quickly, and that they will give special consideration to underserved and disadvantaged communities in the state, including at-risk youth seeking employment pathways out of poverty and into economic self-sufficiency. Since DOE ARRA training and technical assistance funds must directly benefit the low income weatherization program and the existing weatherization service providers, assurances will need to be created to show how the training will benefit the weatherization program and how leveraging of other resources will be captured to supplement DOE weatherization program funding.

## **G. Client Conservation Education**

Client Conservation Education is a key element of Tier 1 for the proposed weatherization program ramp-up. Representatives from the Weatherization Work Group are taking lead in developing an agency-based Consumer Conservation Education Program during 2009. A project lead from the Work Group will identify a timeline, scope of project, and schedule meetings with COMMERCE to clarify expectations, resources, and results.

## **H. New Training Ideas**

COMMERCE will be implementing new processes for delivering training. We plan to explore the capabilities and usefulness of electronic tools such as webinars to conduct trainings, peer-to-peer exchanges, information sharing, and technical assistance. The expected benefits are to reduce travel time, carbon footprint, and expense and increase participation for classroom trainings. Hands-on trainings will still need to be conducted in the field. We are exploring the possibility of establishing training centers on the east and west sides of the state and a mobile Weatherization Assistance Vehicle (WAV).

As noted earlier, The State Board for Community and Technical Colleges has been designated to receive funding to provide workforce training related to weatherization and energy efficiency. An established job skills program is being explored that will allow for customized, short-term and job-specific training between local educational institutions and employers.

COMMERCE will coordinate a Training Coordination Team (TCT) composed of private, not-for-profit, state, and local agencies to provide feedback in the delivery of training and job opportunities.

## **MONITORING ACTIVITIES**

Due to high performance and transparency expectations for the ARRA Weatherization funding, COMMERCE is requiring local agencies to complete and submit a Performance and Resource Plan (PRP). Since the intent of the ARRA funding is to build upon that which already exists, the PRP asks each local agency to describe its plan to increase weatherization capacity and create jobs, meet training needs, and increase households served – all while taking into account all available weatherization funding and resources available to them including ARRA funds. COMMERCE staff will review each PRP with the individual agency and provide technical assistance and training where needed to help the agency meet production goals and spending expectations. COMMERCE is committed to ensuring the success of every agency in the weatherization network, while meeting the ARRA production and spending expectations.

The initial ARRA funding amount in the PRP, determined by the State's allocation formula based on low income families in the service area and climate data, serves as each agency's production and planning guideline. The RAD team will work with local agencies to adjust the funding level as appropriate. As production proceeds, COMMERCE will track achievement to PRP production and spending goals and conduct at least quarterly discussions with each agency and site visits when needed. To ensure that ARRA goals are met, COMMERCE will consider redirecting ARRA or other weatherization funds to other entities, as warranted. For ARRA funds, Washington State's goal is to complete work by July 2011. COMMERCE may issue Requests for Proposals from other entities or develop intergovernmental agreements with other state agencies to help Washington State meet its ARRA production goals, using funds not allocated to the existing weatherization network or funds returned for redirection.

For both 2009 DOE and ARRA Weatherization, COMMERCE continues its on-going evaluation and updating of monitoring protocols and procedures. An important element COMMERCE is introducing is a new team to incorporate Resource Assessment and Development (RAD) strategies to assist local agencies in developing strong systems, implementing best practices, and delivering high quality program services. The initial effort of the RAD team is to focus on customized agency production plans to provide greater accountability. Data collection and monthly reporting on unit production and program spending will help the RAD team assess if local agencies are meeting performance goals and expectations. The RAD team will maintain regular communication with local agencies and will supplement formal on-site monitoring with brief technical assistance visits prior to work start up. Other onsite and phone conference assistance will be scheduled, as needed.

COMMERCE is committed to strengthening our monitoring process to accurately reflect specific areas of an agency's performance at the conclusion of the monitoring visit.

The following forms are part of the COMMERCE monitoring protocol:

- A Pre-Monitoring Questionnaire (PMQ)
- The Local Agency Monitoring Plan (LAMP)
- The WISHA/OSHA Safety Checklist
- Annual Weatherization Work Plan
- Financial Responsibility Tracking Form

The Housing Division's Compliance and Inspections Section is tasked with carrying out the weatherization program's on-site monitoring and program compliance requirements. Each agency will receive a minimum of one on-site monitoring visit each calendar year. As part of COMMERCE's monitoring updates, we will reassess the most effective way of providing feedback to better reflect the local agencies actual performance with respect to the program's systems. Inspections of at least 5 percent of units completed is required. However, COMMERCE will inspect up to 10 percent of units weatherized and may supplement inspections with qualified third-party subcontractors. COMMERCE will continue to emphasize technical assistance during all phases of engagement with each local agency. Additional assistance is provided by contracted trainers, web-based trainings, and teleconferences.

Financial monitoring and technical assistance is performed by a Certified Public Accountant, which contributes to overall weatherization program monitoring and performance accountability. Similar to all monitoring and inspection efforts, the financial monitor focuses on opportunities to provide technical assistance, while ensuring that funds are used in accordance with federal rules and sound accounting practices. The position is shared between two COMMERCE divisions, Housing and Community Services. This arrangement contributes to efficiency and eliminates unnecessary duplication of time and effort among the variety of programs contracting with the same community organizations.

COMMERCE has partnered with Washington State University Extension Energy Program to develop a data collection and reporting tool that will be used to collect project level data on a monthly basis. Agencies will submit monthly online reports for each project in progress or completed. Project data will include household information, such as household type and primary heat source, services provided and measures installed, and direct project costs including labor and materials for each unit served. Collecting, analyzing and using this data will improve the efficiency and effectiveness of our monitoring and RAD team services.



## **7. DOE- Funded Leveraging Activities**

COMMERCE will apply \$300,000 of ARRA program funds to sponsor The Energy Project, an energy conservation and leveraging project which serves the entire Washington State weatherization network. The project is co-sponsored by COMMERCE and the Washington State Community Action Partnership. The Opportunity Council in Bellingham serves as the administrative agent. Over the sixteen years of its operation, the Energy Project's activities have resulted in approximately \$50,000,000 of additional funding for an investment of around \$2,000,000.

The Energy Project will continue historical effort to leverage additional resources and will expand its services to provide technical assistance to local weatherization agencies for capacity-building and weatherization program systems development. In addition, the Energy Project will organize and facilitate Washington State Weatherization Summits 2 and 3 for planning for long-term sustainability and growth of the weatherization program.

Historically, the Energy Project's efforts have helped leverage approximately \$4.5 million of utility funding for weatherization annually, resulting in about 600 additional units weatherized in Washington State per year.

## 8. Policy Advisory Council

The Weatherization Policy Advisory Council (WxPAC) is appointed by COMMERCE and serves in a statewide advisory role in matters related to the development, implementation, and on-going operation of the weatherization programs. Members serve two-year terms. The WxPAC met to review the ARRA DOE Weatherization Plan on May 20, 2009.

### **Organization**

### **Representative**

AVISTA	Chris Drake
Benton Franklin Community Action Council	Dave Odom
Cascade Natural Gas	Allison Spector
Clark County Community Services Department	Tif Rock
Columbia Legal Services	Greg Provenzano
Cowlitz Indian Tribal Housing	Larry Coyle
Commerce, Energy Policy Division	Cory Plantenberg
Opportunities Industrialization Center of Washington	Chris Link
Pacific Power	Becky Eberle
Pierce County Community Action Programs	Sherry Martin
Puget Sound Energy	Sandra Sieg
Rural Resources Community Action	John Hill
Snohomish County Human Services Department	David Ott
Spokane Neighborhood Action Partners	Chris Davis
Tacoma Public Utilities	Mark Percy
The Opportunity Council	John Davies
The Opportunity Council	Kyle White
Washington State Community Action Partnership	Larry Stuckart
Yakama Tribe	Wade Porter

## 9. Hearings and Transcripts

COMMERCE held the Weatherization Policy Advisory Council Meeting on May 19th and the Public Hearing on May 21. A Notice of Public Hearing was sent to the Legal Sections of three major newspapers covering the state of Washington: Seattle Times; Yakima Herald; and the Spokesman Review for publication in their Legal Notices Section. Summary of the comments, list of responders, and responses will be forwarded to DOE.

Based on the Public Hearing feedback process, Washington's DOE ARRA WX Plan was amended to:

Clarify that access to Building Performance Center (BPC) Peer Circuit Rider (PCR) trainings would be accessible to all individuals, as it does not always require travel to Bellingham. The intent of the PCR is travel to the work site to provide hands-on training. The BPC request for proposal was expanded to highlight public comment regarding equal access to hiring and training concerns were addressed throughout the content of the document.

Other changes based on public comment:

- COMMERCE verified that, based on DOE guidance, "inspection of at least 5 percent of the..." is included under monitoring.
- Added "program compliance" to the text.
- Provided further information on the section related to the Department of Ecology Conservation Corp.
- Acknowledge receipt of 500 signed letters from individuals supporting "Got green/Moontown Foundation" noting equal access to jobs and training. COMMERCE reviewed the Evergreen Jobs section of the plan and opine that their concerns are basically addressed.
- Noted that historically private contractors have been left out of most planning efforts managed by COMMERCE. The weatherization training program would be well served by including advocates from the private sector, both contractors and suppliers, whenever planning activities to take place.

In March, COMMERCE invited representatives from the investor-owned utilities, public utility districts, municipal utilities, and the Bonneville Power Administration to discuss the opportunities through ARRA for partnerships relating to the following four topics:

- Utility participation in/assistance with the state program
- Home weatherization
- Resource Conservation Manager program
- Clean technology

Nearly 80 utility representatives participated in the two meetings held in Seattle and Moses Lake.

COMMERCE's Housing Division also held four regional weatherization forums (Everett, Olympia, Spokane, and Yakima) in April to bring people together and explore residential energy conservation opportunities under the American Recovery and Reinvestment Act of 2009 (ARRA). Over 300 people participated in the forums statewide. "Washington's Partnership for Stakeholders to Advance Weatherization in a Green Economy" was a chance to make local connections, identify common themes and opportunities and determine next steps in the process. Our focus was on residential energy conservation and repair as funded by ARRA. Attendees included: current low income weatherization and energy assistance service providers; utilities; non-profit organizations and small business examining ARRA opportunities; municipalities applying for EECBG funds; and other interested parties.

## **10. Adjustments to On-File Information**

Updates were made in the following sections of Washington's On-File Information:

1. Eligible Population – updated the income guidelines and guidance
- 3.1 Type of Work to Be Done
- 3.2 Energy Audit Procedures
- 3.4 Assessment of Effectiveness

## **11. Miscellaneous**

### **11.1. Service to Native Americans and the Tribal Weatherization Project**

COMMERCE's Tribal Liaison works toward improving the communication and interaction between the local agencies, tribes, and other service providers. The Tribal Liaison is responsible for developing state-to-tribal relationships, facilitating dialogue and projects between tribes and local weatherization agencies, and managing special project contracts with tribal nations or other entities.

COMMERCE has reserved \$2,000,000 (approximately 4%) of ARRA Weatherization Program Operations funding specifically for Native American weatherization projects with the intent to improve the delivery of weatherization services to Native American families and to help achieve the four percent statewide tribal weatherization goal. COMMERCE has contracted with the Yakama Nation Housing Authority to serve the Yakama Nation. Smaller agreements have been used to increase tribal service and will continue to be employed where beneficial.

### **11.2. Davis Bacon Act – Compliance and Intent**

COMMERCE has designated staff to focus on Davis Bacon activities in connection with the Weatherization Assistance Program. We are working closely with Washington's Department of Labor and Industries regarding the application of Prevailing Wage and Davis Bacon to weatherization activities. Local agencies have been provided with regular updates on the progress of Davis Bacon guidance for Weatherization and have been apprised of training opportunities for Davis Bacon. COMMERCE is scheduling additional training in Washington State local weatherization agencies in August. COMMERCE has also conducted Webinars and discussion groups on Davis Bacon for Washington local agencies. COMMERCE confirms that compliance with Davis Bacon guidance is a requirement for using ARRA Weatherization funding and these Davis Bacon requirements will be included in ARRA DOE Weatherization contract requirements for our local agencies. COMMERCE has been very clear with local agencies that Davis Bacon/prevailing wage guidance compliance and reporting will be mandatory for Washington State Weatherization agencies as soon as production begins.

### **11.3 Policy Advisory Council Members**

Columbia Legal Services represents the interest of Washington's weatherization priority groups, including the elderly and disabled. Columbia Legal Services advocates for people living in poverty and works to seek social and economic justice for their client populations.

### **11.4 Reweatherization Date**

COMMERCE has changed the DOE reweatherization date to September 30, 1994 in the Weatherization Policies and Procedures, Chapter 1 Eligible Clients and Dwellings.

## **12. Assurances and Certifications**

The following certifications were submitted with the final Washington State Low-Income Weatherization Assistance Plan:

- Nondiscrimination in Federally Assisted Programs, DOE F 1600.5 (Revised 6-94);
- Certifications Regarding Lobbying; Debarment, Suspension and Other Responsibility Matters; and Drug-Free Requirements, FA-CERTS (Revised 3-97), and
- Disclosure of Lobbying Activities, Standard Form LLL.